Grants Management Division Manual

Grants Online Overview and System Navigation

Table of Contents

Document Conventions

Overview
Welcome to the Grants Online Training Manual. This manual is set up to provide you with step-by-step information to accomplish tasks within Grants Online. The manual is logically sequenced based on the National Oceanic and Atmospheric Administration's (NOAA) Grants lifecycle process, and is written to address your role within Grants Online.

Using this Guide
Use the following writing conventions as a guide in using the manual. The manual uses block label text in order to scan for the information desired.

Text Conventions

Text; Example	What it means.
Text in Bold; Click **Done**	Indicates a command.
Text in Italics; *FFO Details* screen appears.	Indicates a screen.
Text in Bold Italics; ***Name***	Indicates data to be entered into a field.
Text in All Caps; LOGIN	Indicates a field name.

Notes and Warnings
Notes and Warnings are used to indicate information or advisories when using Grants Online.
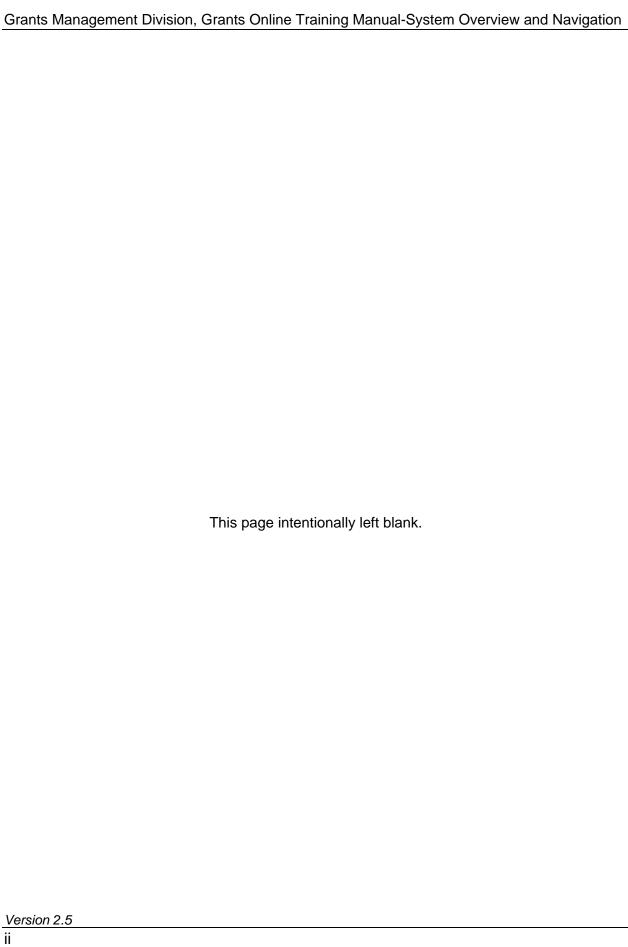
Note: A note is used to inform you about additional information during the procedure or process.

Warning!   Business process may not work as desired or a procedure may produce an undesirable effect.

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Grants Online Overview

Overview   The National Oceanic and Atmospheric Administration (NOAA) offer a variety of competitive and non-competitive grants or Awards to various communities including states, universities, and non-profit organizations. Prior to the advent of Grants Online, the processing of grants was a paper-based task involving time-consuming human interactions and program polices to process the grants and to ensure the awarding of the grant was given to the most qualified applicant for a competitive Award, and for qualified designated applicants of non-competitive Awards.

As part of NOAA's strategy to move scientifically and operationally into the 21st century, Grants Online was developed. Grants Online is an E-Government initiative to create an automated tool that will support the grant evaluation, Award management, and operations process. Grants Online significantly streamlines and unifies grants processing throughout all of NOAA, allowing the Agency to increase efficiencies related to its mission goals.

Grants Online is designed to answer several issues that occur during the Award process including:

- Reducing or eliminating paper forms for application.
- Providing an interface with Grants.gov to ensure applicants can apply for grants electronically.
- Reducing the processing time by incorporating workflows between Federal Program Officers (FPO), Grants Management Division (GMD), Financial Assistance Legal Division (FALD), and Grantees.
- Serving the NOAA community in its efforts to meet mission goals more effectively.

Audience   This manual is developed for the Grants Management Division staff. This guide provides the user with an introduction to Grants Online. This guide does not teach policy or business procedures for the Grants Management Division.

Grants Online Software Description

About Grants Online   Grants Online operates in a web environment. As such, you will be required to use an Internet browser to log in and use Grants Online. No software is required for installation. As Grants Online is web-based, you may access the system anywhere at anytime provided that you have Internet access. Login IDs and passwords are required and will be relayed to you once you are established within the system.

          Note: You must have an Internet connection in order to access Grants Online.

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Getting Started

Overview   When you use any Windows-based software, navigation and ease of use are key components. Grants Online incorporates an intuitive Graphic User Interface (GUI) that assists end users with navigation and appropriate system use. In this module, you will be shown the basics of Grants Online, including the look and feel of the system, navigation, and user customizations.

Module Objectives   The Getting Started module will review the following objectives:

- Obtaining your password
- Logging into Grants Online

Overview   Grants Online is accessible through your web browser, specifically Internet Explorer.

Accessing Grants Online

1.   Click on the Internet Explorer icon on your desktop to open Internet Explorer.

2.   Enter the following URL information in the address bar of your browser:
https://grantsonline.rdc.noaa.gov then press **ENTER**

- *Grants Online Login* page appears

Logging in to Grants Online

1. If you haven't already, contact the Grants Online Help Desk to obtain your Username and Password.

    - Phone: 301-713-1000 or toll free at 1-877-662-2478
    - Email: grantsonline.helpdesk@noaa.gov

2. Enter your assigned *Username.*

3. Enter your assigned *Password.*

4. Click **Enter.**

Warning!   If you enter your username or password incorrectly you will see an error message in red on the screen. After three unsuccessful attempts to log in, the system will lock you out and you will have to contact the Grants Online Help Desk to unlock your account.
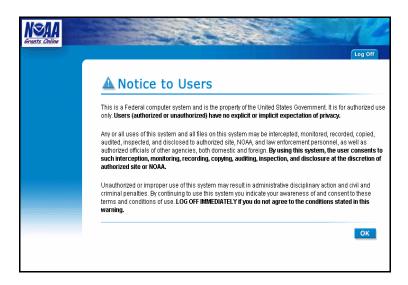
If nothing happens when you click enter, it means the server is down and will need to be restarted.

Note: If you click on the **Grants Online Training** link you can view and download training material including training manuals, quick reference guides, and online webinars.

Logging in to Grants Online

5.   The *Notice to Users* screen appears.

6.   Review disclaimer information and click **OK.**

Grants Online Navigation Features

Overview   Navigating Grants Online is a simple process. The look and feel of the system requires the use of a mouse and keyboard for navigation. Access to certain features of Grants Online is based on your user role.
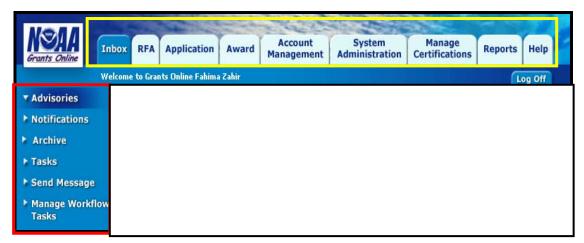
Module Objectives   The Grants Online Navigation Features module will review the following objectives:

- Understanding the screen layout.
- Managing your notifications.
- Managing your inbox.
- Managing your tasks.
- Searching for an Award.

Understanding the Screen Layout

Once you have successfully logged into Grants Online, the system defaults to the **Inbox** tab. Grants Online is broken into the following 3 areas:

- Tabs
- Navigation pane
- Document pane

1. Tabs: Highlighted by the yellow border in the screen shot below and located at the top of the page are the Grants Online tabs. Use the tabs to navigate within the different areas of Grants Online. Click on the appropriate tab to navigate to the desired area.

2. Navigation Pane: Highlighted by the red border below, is the navigation pane. Based on the tab that you are currently on, commands for certain functions display here. Click on the desired command to go to that specific screen.

3. Document Pane: Highlighted by the black border, is the document pane. This is located in the middle of the screen. This is where most of the data in Grants Online will be entered.

> **Note**: Access to various tabs is determined by your user role. A grayed out tab denotes a restricted area. If you try to access a restricted area, a pop-up message will display, stating "Unauthorized to access this area."
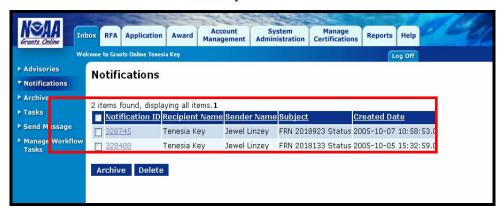
4. Upon successfully logging into the system, you will be taken by default to the *Advisories* page within the **Inbox** tab. The *Advisories* page informs you of the most recent system updates and changes. For example, scheduled system outages, new system releases, and updates to training materials are listed on the *Advisories* page. Click on the links in the navigation pane on the left to view Notifications, Archived Notifications, Tasks, to Send a Message, or to Manage Workflow Tasks.

NOAA Grants Online	Inbox	RFA	Application	Award	Account Management	System Administration	Manage Certifications	Reports	Help

Welcome to Grants Online Regina Evans - Your Password expires in 2 days. `Log Off`

- Advisories
- Notifications
- Archive
- Tasks
- Send Message
- Manage Workflow Tasks

Advisories

Advisory Date	Advisory
11/08/2005 04:18 PM	***ALL USERS – NEW RELEASE *** Release 2.0 of Grants Online was deployed on Tuesday, November 8, 2005. Please visit the "What's New" page of the Grants Online PM website (http://www.ofa.noaa.gov/~grantsonline/whats_new.html) to view the notes for this release.
11/01/2005 10:30 AM	**All FPO's** Please be aware that Grants Online is generating FY 2005 award numbers, when conducting negotiations and generating a new award number. Please follow the steps below to generate an FY 2006 award number: Step 1: Delete the FY 2005 funding details line Step 2: Add any additional funding years beginning with FY 2006, Step 3: Select the "Generate New Award Number" checkbox Step 4: Select the "Save" button Contact the Grants Online Help Desk at 301.713.1000 should you have any further questions.

Accessing Notifications

Notifications are displayed to inform you that you have tasks assigned to you through the workflow process. Other types of notifications include information related to direct assignments, status within the workflow process, and overdue tasks
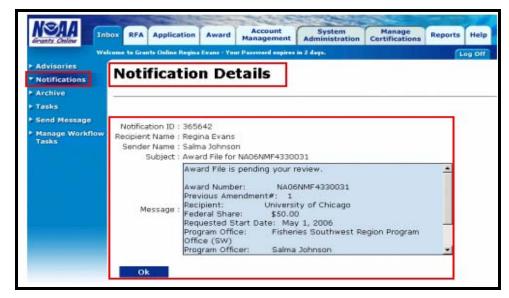
1. From the **Inbox** tab, click **Notifications.** The *Notifications* screen appears.

2. Click on the **ID number** next to the notification you wish to view.

Note: You can modify the notifications that appear in your inbox through the **Account Management** tab. Archived notifications appear in your archive folder, accessible by clicking the **Archive** link.

3. The *Notification Details* screen appears.

4. Click **OK** to close the *Notifications Details* screen and return to the *Notifications* screen.

Archiving and Deleting Notifications

Archived notifications are your personal repository for all notifications you would like to maintain for historical purposes. You can archive your notifications or delete them by checking the box next to the notification and clicking on the **Archive** or **Delete** button.

1. Click the check box next to the notification you wish to archive or delete.

2. Click the **Archive** button or the **Delete** button.

3. The notification is moved to the archives folder or is permanently deleted.

Note: You can delete or archive an entire page of your notifications at once by checking the box in the header column.

Warning!   Once a notification is deleted, it cannot be recovered.

Accessing Archived Notifications

1. From the **Inbox** tab, select the **Archive** link. The *Archived Notifications s*creen appears.

2. Click on the **Notification ID** you would like to view.

3. To delete an archived notification, click the check box next to the ID of the notification you would like to delete and select the **Delete** button.

Accessing and Viewing Tasks

While Notifications alert you to an action you must complete, tasks allow you to complete actions assigned to you within the workflow. Tasks that are assigned to you are in the task section of the **Inbox** tab.

1. From the **Inbox** tab, click **Tasks.** The *Inbox Tasks* screen appears.

2. Click **View** next to the task you wish to view.

Note: You can customize the tasks view through the **Account Management** tab.

3. The following screen is the *Task Launch* page. From this page, you may complete your task by selecting an action from the action dropdown, followed by the **Submit** button. Select the **View previous workflow history and comments** link to view the workflow history of this task, as well as any comments made by other users. You may enter a comment in the COMMENT field. This comment will be displayed in the workflow history and comments. Be sure to enter and save your comment before selecting an action.
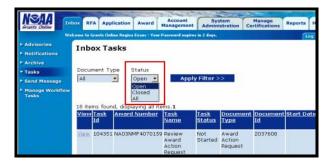

Filtering Tasks

You may filter your tasks to view tasks that are open and pending your action or view-closed tasks, which are completed.

1. Select the document type from the **Document Type** dropdown menu. From the **Status** dropdown menu, select **Open** to view all open tasks, **Closed** to view all closed and completed tasks, or **ALL** to view both open and closed tasks.
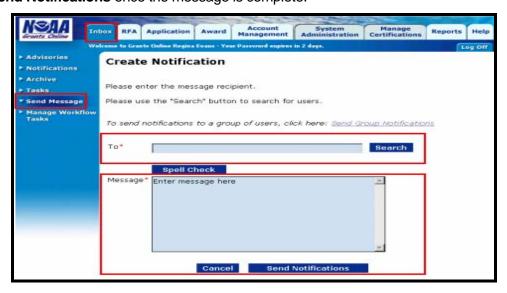

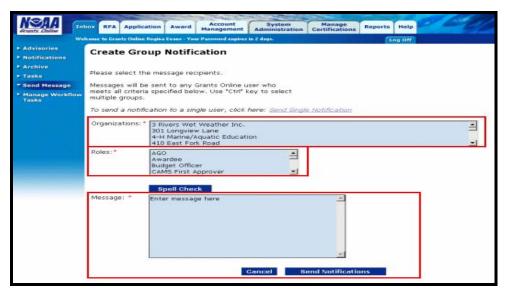**2.** Click **Apply Filter.**

Sending Messages

Notifications can be created and sent as messages via email to an individual or group. The email is sent to the email address indicated in the user's profile.

1. From the **Inbox** tab, click **Send Message**.

2. The *Create Notification* screen appears.

3. Select **Search** in the TO field.

4. Enter your search criteria and select the individual to whom you wish to send a notification.

5. Type the body of the notification in the MESSAGE box.

6. Click **Spell Check** to check your spelling.

7. Click **Send Notifications** once the message is complete.
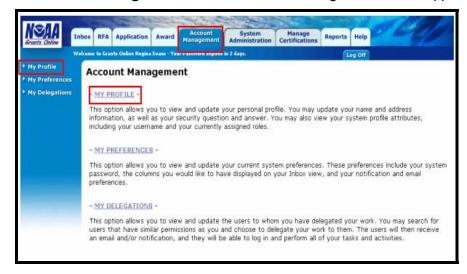
Sending Group Notifications

1. From the *Create Notification* screen (see image above), click the **Send Group Notifications** link.

2. From the *Create Group Notification* screen, select the individuals to whom you wish to send a notification.

3. Type the body of the notification in the MESSAGE box.
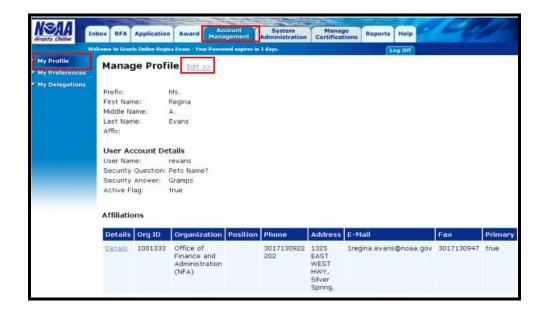
4. Click **Send Notifications**.

Accessing and Editing My Profile

The **Account Management** tab allows you to view your Profile, Preferences, and Delegations. Within this tab, you can update your profile and customize your Notifications/Tasks preferences.

1. Click on the **Account Management** tab**.** The *Account Management* screen appears.

2. From the **Account Management** tab, click **My Profile.** The *My Profile* screen appears.

3. Click **Edit**.

4.   The following screen is the *Manage Profile* screen and allows you to make edits to your profile.

5.   Click **Save** to capture your changes.

6.   Click **Save and Return to Main** to return to the **Account Management** tab main screen.

7.   Click **Cancel** to go back to the previous screen. If you select the **Cancel** button before saving, changes you made will NOT be saved.

Note: To change roles and affiliations contact the Grants Online Help Desk.

Accessing and Customizing My Preferences

Customize your viewing preferences through the *My Preferences* screen. You may add/remove email inbox notifications. This will remove notifications sent to your external email account only. Headings may be customized to display certain fields on your *Tasks* and *Notifications* screens. Additionally, you may change your password for Grants Online.

1. From the **Account Management** tab, click **My Preferences**. The *User Preferences* screen appears.

2. Select desired notification and/or tasks to enable/disable by clicking the check box next to the notification or the task.

3. Click **Save.**

Changing your Password

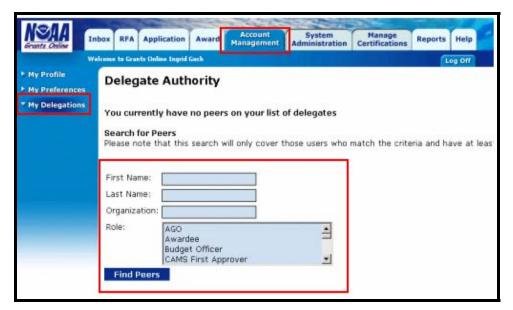**1.** Click **Change Password** in the *User Preferences* screen.

2. In the OLD PASSWORD field, enter your old password.

3. Enter the new password in both the NEW PASSWORD and in the CONFIRM NEW PASSWORD fields. Be sure to follow the password guidelines when creating your new password.

4. Click **Submit**.

Accessing My Delegations and Adding Delegates

When you select the **My Delegations** link from the **Account Management** tab, you will be able to view existing delegates, add delegates, and rescind delegates. The only users you can select as a delegate are those that have roles matching yours. For example, a Grants Specialist cannot delegate their inbox to a Grants Officer.

1. From the **Account Management** tab, click **My Delegations.** The *Delegate Authority* screen appears.

2. Enter search criteria by FIRST NAME, LAST NAME, ORGANIZATION, or ROLE.

3. Click **Find Peers**.

4. From the search results, select the name of the person you would like as your delegate and select the **Delegate** button.

Rescinding a Delegation

1. From the **Account Management** tab, click **My Delegations.** The *Delegate Authority* screen appears.

2. Select the **Rescind** link to remove an individual as your delegate.

Logging in as a Delegate

1. Log in to Grants Online with your username and password.

2. Click **OK** on the *Notice to Users* page.

3. Choose to either continue in as yourself (**Continue to Inbox**) or click on the **Select** link to log in as the person who delegated their inbox to you (Click **Select** – by the person's name).

4. When you are in Grants Online as a delegate, the system will identify you as a delegate. Both you and the delegate can work in Grants Online simultaneously.
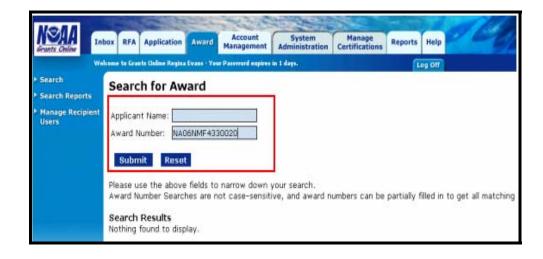

Searching for an Award

1. Select the **Award** tab.

2. Select the **Search** link to search for an Award.

3. Enter search criteria into at least one of the query fields listed.

4. Click **Submit** (the "Nothing found to display" message remains displayed until you click the **Submit** button).

5. Select the Award you want to view by clicking the Award number link.

6. The *Grants File* page is displayed. From this page you can view Grant information, sub documents, associated attachments, and associated documents (ex. Award Action Requests, Performance Progress Reports, and Financial Progress Reports).